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Coffee

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World Coffee Situation

WORLD COFFEE SITUATION

Summary and Outlook

The second USDA world coffee crop estimate for 1984/85 is 93.6 million bags 1/, 1 percent above the June 1984 forecast and 4 percent more than the 1983/84 harvest. These figures differ from those released on December 5, 1984, because estimates for El Salvador and Rwanda have been revised. Brazil is expected to produce 27 million bags in 1984/85, down 10 percent from last year. Early season conditions have been good for the 1985/86 crop, with favorable weather prevailing throughout the major coffee-producing states. Colombia's 1984/85 coffee crop estimate is unchanged from the June forecast, but 2 percent below last year. Most of the major North and Central American coffee producing countries are expecting increases. A much larger crop in the Ivory Coast will raise Africa's 1984/85 output 19 percent above 1983/84 while a dramatic turnaround in India will increase Asia's and Oceania's production by 16 percent.

World coffee exports reached an estimated 67.8 million bags during crop year 1983/84, up 2.9 million from 1982/83. A further 1.4-million-bag increase in exports is expected for 1984/85. If USDA's estimates for production, domestic use and exports by producing countries are correct, world coffee stocks would increase by 3.2 million bags during 1984/85 to end the year at 48.5 million. In all cases, the stock figures are gross and may, therefore, contain substantial quantities--possibly as much as 5 million bags--of non-exportable quality coffee.

T/ Unless indicated otherwise, production and trade figures are given in terms of 60 kilogram bags (132.276 lbs.). Area is given in hectares (2.471 acres). GBE means "green bean equivalent."

SUPPLY AND DISTRIBUTION

World Coffee Production

Most of the coffee produced in the world today can be classified as either Arabica or Robusta. In 1984/85, about 68.7 million bags or 73.4 percent of world output will be Arabica, down from 71.2 million or 78.8 percent of the 1983/84 crop. A relatively greater expansion has occurred in Robusta producing countries over the past 25 years. Within countries which produce both, such as Brazil, Cameroon and Ecuador, the higher yielding, more disease resistant Robusta species have been preferred. Estimated output by type has developed as follows:

Crop Year	Production (1,000 bags)	Arabica	Robusta (Percent)	Other 1/
1960/61....:	65,374	80.3	19.3	.4
1965/66....:	82,157	79.9	19.8	.3
1970/71....:	59,426	70.0	19.5	.5
1975/76....:	73,109	76.0	23.7	.3
1980/81....:	86,344	73.3	26.4	.3
1983/84....:	90,359	78.7	20.9	.4
1984/85....:	93,608	73.4	26.3	.3

1/ Mainly Liberia.

Exports

World coffee exports are now expected to total 69.2 million bags during crop year 1984/85, 2 percent over 1983/84. Members of the International Coffee Organization (ICO) will probably export 58.0 to 59.5 million bags to member importing countries and 9.5 to 10.5 million to non-member countries. Now that Cuba has joined the ICO, non-member shipments should total no more than 250,000 bags including 150,000 to members and 100,000 to non-members.

Coffee exports by ICO exporting members in October and November 1984 totaled only about 46 percent of the October/December 1984 export quota. October shipments were at the lowest level in six years. Robusta exports for the month were only 600,000 bags as compared to the 1.6 million bags shipped in October 1983.

The tightening of ICO control measures to reduce the flow of coffee that is supposedly destined for non-member countries but seeps back into member country markets have not had a significant effect on total shipments to non-members. This could indicate that most non-member shipments are actually consumed in the non-member country or that the new control measures have not

been successful. A number of exporting members are having difficulty confirming that their non-member exports actually reach the non-member destination as now required by the ICO.

**COFFEE SHIPMENTS TO NON-MEMBER COUNTRIES
(1,000 bags)**

Exporting Group	<u>Coffee Years</u>			
	1980/81	1981/82	1982/83	1983/84
Colombia Mild.....	1,122	1,609	999	1,059
Other Mild Arabicas.....	1,932	2,598	4,861	3,437
Brazil & Other Arabicas....	2,749	1,681	1,907	3,003
Robustas.....	1,930	3,097	2,627	2,368
 Total <u>1/</u>	 7,732	 8,984	 10,394	 9,867

1/ Totals may not add due to rounding

Sales to non-members by Brazil, which had led the fight against such sales, showed the largest percentage increase. The following were the largest exporters of coffee to non-members in 1983/84 with 1982/83 comparisons:

:	1982/83	1983/84	% Change
-----Thousands of Bags-----			
Colombia.....	709	836	+18
Costa Rica.....	609	571	- 6
Mexico.....	1,231	852	-31
Brazil.....	1,735	2,821	+63
Indonesia.....	1,567	1,997	+27

The price spread between coffee sold to members and non-members averaged about 69 cents per pound in 1983/84 up from a 39 cent^{1/} spread in 1982/83. Price discounts for non-agreement coffee continue to threaten the smooth functioning of the agreement as well as the continued participation of existing members.

1/ Oct.-June

WORLD CONSUMPTION

Disappearance in importing countries rose only marginally between coffee years (October/September) 1982/83 and 1983/84 from 56,710,000 bags to 56,952,000 bags. Disappearance is derived on the basis of the data on net imports of all forms of coffee adjusted for changes in visible inventories.

IMPORTS OF GREEN COFFEE BY SELECTED COFFEE CONSUMING COUNTRIES (60 kg bags)

Country	Period	1983	1984	Percent Change
Japan.....	Jan./Nov.	3,063,325	3,493,578	- 14.0
Switzerland.....	Jan./Nov.	914,970	912,833	- 0.2
United States....	Jan./Oct.	13,815,873	15,419,331	+ 11.6
West Germany.....	Jan./Oct.	6,007,781	5,900,038	- 1.8
France.....	Jan./Oct.	4,393,003	3,993,237	- 9.1
United Kingdom....	Jan./Oct.	1,325,265	1,575,375	+ 18.9
Finland.....	Jan./Oct.	893,641	889,728	- 0.4
Austria.....	Jan./Oct.	867,053	723,228	- 16.6
Netherlands.....	Jan./Sept.	1,809,691	1,778,859	- 1.7
Sweden.....	Jan./Sept.	1,068,792	1,126,299	- 5.4
Denmark.....	Jan./Sept.	599,255	580,940	- 3.1
Italy.....	Jan./Aug.	2,631,000	2,289,000	- 13.0
Canada.....	Jan./Aug.	913,160	989,383	+ 8.3
Norway.....	Jan./June	316,155	348,433	+ 10.2
Belgium/Lux.....	Jan./Mar.	351,608	443,212	+ 26.1
Total.....		18,970,572	40,463,474	+ 3.8

SOURCE: Official Statistics and trade sources. Compiled by the George Gordon Paton and Co., Inc.

World coffee consumption, according to the ICO, is forecast to rise about 1 percent during 1984/85, bringing total disappearance to about 58.0 million bags.

World Coffee Stocks

Over 90 percent of the world's coffee stocks are still held by producers and the amount they hold has continued to increase although now there is a growing concern about quality. Stocks held by producing countries are forecast to increase by about 3.2 million bags during the current crop year. At this level stocks represent 53 percent of anticipated world consumption for the year and 70 percent of exports. The ICO has begun a study to determine what portion of these stocks are of export quality.

While some countries such as the Ivory Coast were extremely hard pressed to meet their ICO quota for 1983/84, others with heavy stocks and financial problems continued to seek outlets in non-ICO markets at substantially reduced prices. The largest stocks are held by Brazil and Colombia (Table 4).

The location of carryover stocks at year's end is estimated as follows:

Location	Crop Year	
	1983/84	1984/85
	-----(1,000 bags)-----	
North America, Central America and Caribbean.....	6,375	6,721
South America.....	23,210	24,488
Africa.....	12,714	13,838
Asia & Oceania.....	2,971	3,416
World Total	45,270	48,463

Inventories in importing member countries of the ICO have decreased from 4.5 million bags on June 30, 1983, to about 3.9 million bags a year later. Stocks in the United States are estimated to have decreased from 1.2 million bags to 600,000 bags over that period.

U.S. SITUATION

U.S. Imports

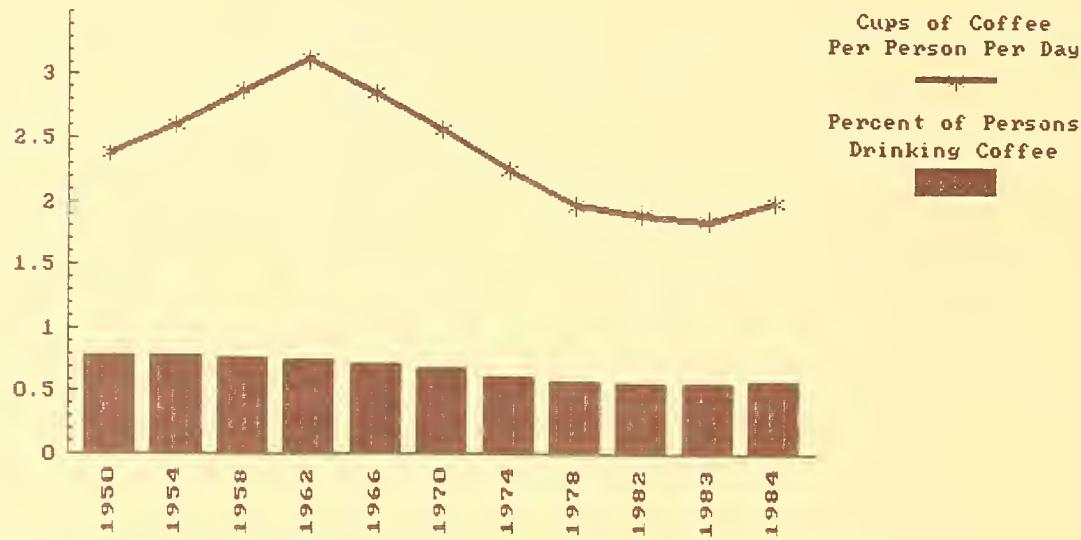
U.S. imports of green coffee during October 1973/September 1984 totaled 18.1 million bags, valued at 3.09 billion--this is up 6 percent in volume and 17 percent in value from year-earlier levels. The unit import value for September was \$1.31 per pound, compared with \$1.20 per pound in October 1983. A comparison of U.S. imports by countries of origin for coffee years 1982/83 and 1983/84 appears in Table 5.

U.S. Coffee Consumption 1/

The United States is the largest single market for coffee in the world. Data collected by the International Coffee Organization for its Annual World Coffee Drinking Study shows a long-term decline in coffee consumption in the United States on a per capita basis. The following graph shows the trend in cups consumed per person per day and the percentage of the population drinking coffee for the past 40 years.

COFFEE CONSUMPTION IN THE UNITED STATES PER CAPITA CONSUMPTION AND PERCENTAGE DRINKING

1950-84



Horticultural and Tropical Products Division
Commodity Programs, FAS, USDA
Source: International Coffee Organization

There was an increase in the proportion of people drinking decaffeinated coffee from 15.3 percent in 1983 to 17.7 percent in 1984. On the basis of cup consumption, decaffeinated coffee accounts for 22 percent of all coffee consumed, about equally divided between regular and soluble coffee. While the rate of coffee consumption increased for nearly all groups, consumption continues to be highest among persons in the older age groups. Although coffee consumption has decreased significantly since 1962, coffee remained the most popular beverage in 1984, narrowly edging the percentage consuming soft drinks.

1/ Information in this section is based on the ICO's Coffee Drinking Study, United States of America, Winter 1984.

According to information provided by the George Gordon Patton & Co., Inc., from a representative group of United States roasters, the amount of green coffee roasted in the United States (including the amount used in the production of soluble coffee) to December 1, 1984, was approximately 102.9 percent of the amount roasted in a comparable period last year and about 100.9 percent of the amount roasted in 1982.

The Bureau of Labor statistics reports the wholesale price of a 1-pound can of ground roast coffee during November 1984 averaged \$2.58, up from \$2.46 per pound 1 year earlier. Wholesale prices for soluble coffee rose from \$7.44 per 16 ozs. in November 1983 to \$7.94 for the same month in 1984.

INTERNATIONAL COFFEE ORGANIZATION

On October 1, 1984, member countries of the International Coffee Organization (ICO) agreed on a system for coffee year 1984/85 (October/September) aimed at bringing market supply and demand among members into equilibrium at \$1.30 per pound. While producing countries had sought to restrict exports and raise prices, major consuming countries for whom coffee prices had been artificially high in view of the large overall world supply, opted for an agreement which would bring prices back into the middle range of the price band set for 1983/84. For West Europeans and other non-U.S. importers, high coffee prices have been exacerbated by the strength of the dollar.

Quotas

Under the terms of the agreement reached on October 1, the annual global quota would be set at 59.0 million bags for 1984/85 within a 54.0-64.0 million bag range. The ICO's price defense system has an outer range of \$1.15-\$1.45 and a preferred inner range of \$1.20-\$1.40 per pound. When prices rise to or above \$1.40 and remain there for 15 days two additional 1.0 million-bag increments would be released. A rise to the outer range of the price ceiling would trigger two more increases of a larger magnitude (1.5 million bags). Corresponding quota cuts would occur as the market price falls to or below \$1.15 per pound. A system of quota withdrawals and restorations operates within the outer range of the price defense mechanism. The market price directed quota system can be suspended if the 15-day moving average of the Composite Indicator Price remains at or above \$1.50075 for (1) a minimum of 30 consecutive market days and all pro rata upward adjustments have been applied, or (2) for 45 days provided all remaining releases are applied on the date on which the 15-day ICO indicator price reaches \$1.50075.

While global supply/demand equilibrium among member countries of the ICO at about \$1.30 per pound was expected with a 59.0-million bag global quota, the effective initial annual quota for coffee year 1984/85 was set at 61 million bags. The 2 million bag increase was regarded as already earned based on the market price level existing on entry into the new year. One of the two increases would be withdrawn if the 15-day moving average price fell to or below \$1.35 per pound and the second when it fell to or below \$1.30.

The new agreement also involved the "front loading" of annual quotas so that more coffee would be available during the first quarter to overcome a shortage of Robusta, the result of poor crops among members of the Organization of African and Malagasy Coffee Producers (OAMCAF). In order to increase the supply of Robusta available in the market, three non-OAMCAF producers of this type of coffee were issued export stamps for 35 percent of their annual export quota for 1984/85 for use during the first quarter. Stamps for an additional 15 percent would be issued for the second quarter with the balance divided for use during the remaining two quarters. OAMCAF countries are allocated 25 percent of their stamps per quarter. All other basic quota countries received 27.62 percent of their annual allotment of stamps for use during the first quarter with 24.12 or 24.13 percent to be distributed for use in each of the remaining three quarters.

On December 13, 1984, the ICO's 15-day moving average indicator price fell to 134.76 cents per pound, triggering an immediate 1 million bag withdrawal from the 61-million bag global quota established in September. The withdrawal was distributed among ICO exporters with a basic quota in accordance with their percentage shares of the overall quota. (Table 8.)

Market Shares

The percentage formula developed by the ICO whereby, individual member quotas were to be based 70 percent on export history and 30 percent on stocks, was again abandoned in favor of an ad-hoc arrangement. Exporting member shares of the global quota are essentially unchanged from the 1982/83-1983/84 arrangement and will remain in effect for the next two years. (Table 6.) The arrangement does not favor countries holding large stocks. The bulk (55,112,500 bags) was allocated to exporting members entitled to a basic quota, other than Angola, according to procedures shown in Columns (1) to (4) of Table 7. Column 3 of the table indicates special allocations for 1984/85 totaling 365,000 bags which are not subject to change or to be included as part of the global quota for purposes of redistributing shortfalls.

Members exempt from basic quotas

Countries exempt from basic quotas, generally those with quotas of less than 400,000 bags and not subject to quota cuts and increases, are authorized 4.25 percent of the initial annual global quota. (Table 9.) The shares are adjusted to account for changes in membership.

Several countries received special allocations which are not subject to increases or reductions. These allocations which are shown in column 3 of Table 9 also cannot be included as part of the global annual quota for purposes of redistributing shortfalls for individual members. Members exempt from basic quotas exporting more than 100,000 bags are subject to quarterly quotas while those exporting 100,000 bags or less can export their entitlement at any time during the coffee year.

Prices

The main reason the United States joined the ICO was to help smooth price adjustments around a long term price trend, not to establish a cartel to rig prices. (Figure 1.) The primary concern of U.S. negotiators for coffee year 1984/85 was the establishment of a global quota sufficiently large to put effective downward pressure on prices and to stabilize them in the mid-range of the price band. Despite a global quota for 1983/84 of 60.2 million bags which included four upward adjustments and an initial 700,000 bag increase, prices remained above \$1.40 per pound in terms of the 15-day moving average of the Composite Indicator Price (CIP) which controls coffee quotas, for much of the year.

The price situation during 1983/84 was not believed consistent with the longer term trend. When quotas were reintroduced in October 1980, the indicator price had fallen from post Brazil frost highs of over \$3.26 to about \$1.20. Prices averaged about \$1.11 per pound in 1980/81 and about \$1.25 per pound in both 1981/82 and 1982/83. During 1983/84 the 15-day indicator price rose from \$1.25 in October to \$1.50 on June 1 with the daily price having reached a high of \$1.56 on May 21. The 15-day CIP was above \$1.40 at year's end.

ICO COMPOSITE INDICATOR PRICES

	U.S. Cents Per Pound			
	1981	1982	1983	1984 1/
Unwashed Arabicas.....:	179.6	143.7	142.8	150.9
Colombian Milds.....:	145.3	148.6	141.6	149.3
Other Milds.....:	128.1	139.9	131.7	146.0
Robustas.....:	102.9	111.1	124.1	139.8
Composite 2/.....:	115.5	125.5	128.0	142.9
1/ Jan./Sept. average.				

A number of factors appear to have contributed to the higher prices in 1983/84 including (1) severe problems with coffee quality in Brazil, (2) weather related crop shortages and transportation problems in a number of the major Robusta producing countries, and (3) an increasing concern about the existence and export quality of stocks in many exporting countries. The prospect of frosts in Brazil traditionally heighten concern over access to stocks during the June-August period. In addition to the fundamental supply and demand factors, the psychological element of buyers and sellers both trying to establish their positions in the market based on expectations also contributed to the higher prices.

There was surprisingly little market reaction to the 1984/85 arrangement. Prices remained stable at around \$1.40 for the first two months of the new year with much of the strength coming for the "Other Milds" coffees. New York

market prices for these coffees were kept from rising by heavy Colombian offerings at slightly above this level. Brazil has had to lower its price to large roasters in order to speed up lagging quota market sales. However, it was a weakness in the London Robusta market which triggered a decline in the 15-day composite indicator price in December and a 1-million bag cut in the global quota on December 13th when the \$1.35 per pound level was reached. (Table 11.)

Cuba and Zambia Become ICO Members

At its September 17-October 1 Council meeting the ICO approved the admission of Cuba as an exporting member. Cuba will have a quota of 150,000 bags for 1984/85 and 160,000 bags for 1985/86. Cuba, which produces Arabica coffee, had formally requested a much larger amount, but the working group on accession believed the levels authorized were more nearly in line with Cuba's current coffee trade patterns. The bulk of Cuba's exports are expected to go to Spain under a bilateral trade agreement between the two countries. Cuban membership could eventually lead to the membership of the USSR, since the USSR left the ICO shortly after Cuba more than a decade ago.

Zambia has also been provisionally accepted into the ICO as an exporting member exempt from basic quota. It will also be classified as an "Other Mild" Arabica producer with annual export quotas of 5,500 bags for 1984/85 with the possibility of an increase for 1985/86.

Entry of these two countries raises exporting membership to 50 countries and reduces non-member production to less than one-half percent of total world output.

Basket Quota

For coffee year 1984/85 ICO importing members can receive a maximum of 441,706 bags from non-members, down from the 507,619 bag limit applicable for 1983/84. Imports into the United States for the current coffee year will be limited to 74,710 bags and must be imported from February 1 to September 30, 1985. The United States does not plan to have a basket quota program after this year. The Federal Republic of Germany, Netherlands, Japan and Singapore will also reduce voluntarily the amount of coffee to be imported by them from non-members below the authorized levels for 1984/85 as shown in Table 10.

Undershipments and Shortfalls

In part, the high prices in 1983/84 can be attributed to undershipments during the year by producer members regardless of intent. To deal with this the Council approved new rules concerning the identification of undershipments along with the declaration and distribution of shortfalls. At the end of the second and third quarters the Executive Director of the ICO will consult with member countries whose shipment fall short of their entitlements to determine if they can meet their quota obligations. If not, the Executive Board would take appropriate action. Exporting members would be encouraged to declare

possible shortfalls as soon as possible. Declared shortfalls would be redistributed to other members of the same group able to increase its exports, on a pro-rate basis. Countries with undeclared shortfalls at year's end would be penalized by quota reductions the following year.

Tegucigalpa Group

Producers of "Other Milds" of Latin America plus Colombia and Brazil met in May 1984 to form the "Tegucigalpa Group" to coordinate policy on green coffee sales to countries outside the ICO. At a later meeting in Mexico City December 3-4, 1984 they indicated a desire to raise the green coffee price to at least the \$1.20 floor price of the ICO indicator price range. On an interim basis there was agreement that minimum prices for Colombian coffee should be 85 cents per pound f.o.b., 82 cents for "Other Milds" and 79 cents for Brazils. Members of the "Tegucigalpa Group" were scheduled to meet with officials from the major Robusta producing countries Indonesia, Ivory Coast, and Zaire at the ICO meeting in London in January 1985 to encourage their participation.

IACO

The Interafrican Coffee Organization (IACO) held its 24th annual meeting November 13-16, 1984 in Kampala, Uganda. They resolved to strengthen ties as a voting bloc within the ICO in order to gain increased influence over world coffee trade.

ICO Executive Board

The Executive Board of the ICO held its first regular meeting of the new year January 10-11, 1985, to review the market situation, operation of the quota system, controls on exports to non-members, stock verifications, and a number of other issues.

PRODUCTION AND TRADE IN SELECTED COUNTRIES

Costa Rica: New census data indicate that around 6,500 hectares of new coffee have been added in recent years with about half of the area already in production. Because good coffee land is limited, increased plantation density is also being used as a means of increasing output. In 1984/85, favorable weather, increased fertilizer use and improved pruning techniques more than offset some premature berry drop caused by the fungus disease Cercospora Coffeicola. Rust is not expected to effect production in a major way, but labor and chemical costs are increased by the need to treat the plantations.

The growth in Costa Rican production has not been matched by its ability to find markets. If Costa Rica is unable to improve on its sales volume, it will end 1984/85 with over 1.3 million bags of coffee stocks, up 400,000 bags from the preceeding September 30.

Over the last three years the general consensus has been that El Salvador's long-term productivity was being jeopardized by the lack of new plantings and poor management practices. However, National Coffee Institute (INCAFE) officials now report that new plantings are again occurring at levels almost sufficient to maintain current production levels. The larger 1984/85 crop, however, mainly reflects improved weather conditions.

Preliminary data, shown below, indicate total exports increased slightly between 1982/83 and 1983/84.

ICO Markets Destination	1982/83	1983/84
---60 kilogram bags---		
United States.....	972,242	1,238,994
Federal Republic of Germany...	685,526	774,071
Japan.....	116,002	149,687
Canada.....	---	27,216
Belgium & Other.....	<u>404,738</u>	<u>74,238</u>
Non-ICO Markets.....	711,492	679,794
Total.....	2,890,300	2,944,000

Major non-ICO markets in 1983/84 were East Germany, Poland, Romania, Egypt and Israel.

Total exports may decline to 2.8 million bags during 1984/85 if shipments to non-ICO countries cannot be maintained.

Heavy rains that fell in late September and October did little damage to the Guatemalan coffee crop, most of which is grown on mountain slopes where drainage problems are minimal. Dense planting is now reaching down to the middle level and smaller producers and has permitted growers to increase output from the same or less area, thereby decreasing per unit production costs. Higher yields in combination with good coffee prices during 1984 made it possible for Guatemalan producers to increase their use of fertilizer as well as putting them in a better position to control coffee bean borer damage and coffee rust.

In Honduras, rainfall and temperature patterns were generally favorable for the 1984/85 crop, while coffee rust and broca damage were minimized by fairly effective control programs financed by the Honduran Coffee Institute (IHCAFE). Since 1977, IHCAFE has also been involved in a project to diversify over 2,000 hectares of marginal coffee into the production of other crops including cocoa, pepper, allspice, cardamon, macadamia nuts, pineapple, rubber, citrus, and plantains.

Slightly higher yields are now expected to boost Mexico's 1984/85 (October/September) coffee crop 2.5 percent above last season. Although limited sunshine caused a delay in the maturation of the current year's harvest, bean size and quality are expected to be good.

Coffee is Mexico's most important agricultural export commodity, accounting for 47.5 percent of the sectors foreign exchange earnings in 1983. The 2.9 million bags Mexico exported in 1983/84 were enough to allow it to complete its ICO mandated quota and ship 860,000 bags to non-members market. The United States normally takes 60 percent or more of Mexico's exports. Hungary, East Germany and Czechoslovakia are the principal non-member markets.

In Brazil, overall dehusking yields in the three major producing states of Parana, Sao Paulo and Minas Gerais support a production estimate for the country's 1984/85 (July/June) coffee crop of 27.0 million bags.

Based on initial field observations the Office of the U.S. Agricultural Counselor in Brazil believes the 1985 (1985/86) harvest will reach 30.0 million bags distributed by states as follows:

<u>States</u>	<u>Millions of Bags</u>
Parana	4.0
Sao Paulo	9.0
Minas Gerais	10.0
Other	4.5
TOTAL	30.0

Despite the relatively high costs of inputs including credit, an attractive Government support price led growers in general to take good care of their coffee trees. This, in combination with overall good flowering followed by excellent cherry setting and the absence of significant disease or insect problems, are the basis for the 1985 coffee forecast.

Attractive support and market prices are believed to have led to a small scale, privately financed expansion in Brazil's overall coffee tree population from 3.7 billion trees in 1983/84 to 3.775 billion in 1984/85 and to 3.8 billion in 1985/86.

During the 1983/84 coffee marketing year, Brazil exported 18.7 million bags of coffee including the green equivalent of 1.9 million bags as soluble coffee. For 1984/85 exports are projected to total 18.0 million bags.

In 1983/84 Brazil was able to meet its ICO quota by offering bonus and special price discounts to its major buyers mainly the large roasters in the United States and Europe. Since September export sales have lagged well below quota levels. In an effort to make Brazil's coffee more competitive in the world market, the Brazilian Coffee Institute lowered its "Contribution Quota" or export tax by \$10 per bag to \$68 effective December 12, 1984. However, the

reduction was more than offset by a 10 to 15 percent rise in domestic market prices in anticipation of the move. The IBC subsequently negotiated sales contracts with major U.S. and European importers which will lower the real price for Brazilian coffee from \$1.20 per pound in 1984 to \$1.15 in 1985. Contracts can include a maximum 20 percent Robusta and 80 percent or more Arabica. The real selling price will be based on the average price between 60 percent Central American coffee and 40 percent African Robusta, up from 35 percent last year. The term guarantee against market price reductions of up to 20 cents per pound has been increased from 40 to 60 working days from shipment.

Brazil has reportedly sold China 100,000 bags of coffee at a discount of \$78 per bag. An additional 12,000 bags will be delivered free-of-charge for promotional purposes to help develop coffee drinking among the Chinese.

The IBC has announced the main points of the Government's 1985 coffee policy to be:

- 1) Implement a new export quota distribution system which will likely increase the shares of the grower's cooperatives.
- 2) Give additional support to growers now regarded as the highest risk sector of the Brazilian coffee industry.
- 3) Operate from a position of crop surpluses rather than of shortages.
- 4) Improve the efficiency of the domestic processing industry and increase domestic coffee consumption.

Heavy rains and cloud cover in late October and early November in Colombia reportedly reduced the 1984/85 coffee harvest by up to 10 percent. Damage was primarily the result of bean drop although it was also expected to affect flowering for that portion of the bean crop harvested between April and July 1985.

Because institutional credit has not been available for establishing new plantations for several years, the area in coffee remains relatively unchanged at 1.01 million hectares. Yields on traditional plantations averaged close to 450 kg per hectare in 1983/84, compared to improved plantations without shade at 1,550 kg/ha. Yields were up for all three sectors because weather conditions were generally favorable, especially during blossoming in major producing areas. Also fertilizer use was more extensive despite higher prices, and there was some improvement in tree care by growers apprehensive about coffee rust. At the end of September 1984, one year after first being discovered in Colombia, rust affects about 2.0 percent of the total coffee area. Crop quality was reportedly better in 1983/84 than in 1982/83 because more water was available on farms for the washing of coffee cherries which helped to reduce acidity.

Marketing year 1983/84 exports are officially placed at nearly 9.97 million bags, 8.6 percent higher than a year earlier. Exports to non-ICO members at 836,446 bags were 18 percent higher. Sales to non-ICO markets could fall

during the current year, more than offsetting any gains to markets within the ICO. The typical non-member agreement involves barter arrangements with Eastern Bloc countries especially Czechoslovakia. Most of Colombia's major ICO export markets are in West Europe.

A major part of the coffee purchased by the Coffee Growers' Federation (CGF) but not sold is held by ALMACAFE (the CGF marketing agency). Growing stock levels are becoming an increasingly difficult financial burden for Colombia's National Coffee Fund. At the end of the current marketing year (1984/85) stocks are expected to total 13.6 million bags, up from 12.7 million bags at the end of 1983/84. All stocks currently held are believed to be of export quality, maintained in that condition by a rotational withdrawal system administered by ALMACAFE.

Colombia plans to stabilize future production at between 12.0 and 13.0 million bags on the best coffee lands, and to the extent national funding is available, implement Project Prodesarrollo under which over 200,000 hectares of marginal coffee will be converted to crop, livestock, and forestry uses.

Renovation by pruning or replacement of older less productive plantations with the new high yielding, rust resistant variety "Colombia" are now the major objectives for the main producing areas. Special lines of credit in increasing amounts have been opened for these activities from the Agricultural Financing Fund (FFAP).

Peru's coffee exports in 1984/85 may be down somewhat from the 982,000 bags exported last year due to a reduction in demand from some non-member countries, especially Argentina. However, as a partial offset, Peru may sell coffee to the Soviet Union under a bilateral agreement designed to reduce its debt to that country provided a satisfactory arrangement can be reached on prices.

Ecuador's 1984/85 (April/March) coffee crop estimate is up 12 percent from 1983/84. Yields of both Arabica and Robusta coffees have rebounded sharply from the torrential rain depressed levels of the past two years. New coffee plantings are known to have occurred in the Amazon basin (Oriente Province). While Ecuador is known primarily for its Arabica, most of the new planting have been to the higher yielding Robustas and Robusta output now exceeds that of Arabica. A prohibition on exports to ICO non-members during the last two quarters of coffee year 1983/84 (April-September 1984) has been lifted and non-member shipments should increase.

Cameroon's 1984/85 coffee crop got off to an excellent start under favorable weather conditions--well distributed rains interspersed with good periods of sunshine. Output could reach a record 2.1 million bags, nearly double the disappointing drought reduced harvest of 1983/84. Cameroon's coffee area is estimated at 400,000 hectares of which about 55 percent is Robusta and 45 percent is Arabica. While coffee's area is thought to be gradually expanding, competition of cropland for food is a significant constraint for Cameroon, as it is for much of Africa. New census data, now being developed,

are expected to show substantial growth in Robusta's share. Robusta trees mature earlier, bear heavier, and are more profitable. The problems of Cameroon's overage Arabica trees are accentuated by the loss of crop area to urbanization and the lack of a fertilizer well adapted to the soil conditions in the areas where Arabicas are grown.

Coffee production estimates for the Ivory Coast have been lowered from 5.0 to 4.833 million bags for 1984/85 (October/September), and from 1.92 to 1.417 million bags for 1983/84. The drought-reduced 1983/84 harvest was catastrophic with output down 69 percent from 1982/83. Eastern production areas suffered the most with losses of up to 75 percent. More favorable weather conditions, the up year of a two-year production cycle, and the continuing rejuvenation of overaged coffee trees are the main reason for the improvement expected in 1984/85.

The Ivory Coast nearly depleted 1983/84 carryin stocks totaling nearly 1.4 million bags in an effort to meet its ICO quota for the year. Only an estimated 429,000 bag carryover of poor quality beans was available on October 1, 1984 against a quota of 1,090,704 bags for October/December 1984. Farmers were being encouraged to harvest and deliver their coffee to processing mills during the first quarter of the crop year rather than waiting until January-February so that the country could take advantage of favorable market prices for Robusta coffee and meet its ICO quota for the quarter.

Crop quality dropped dramatically during 1983/84. Some cooperative groups overestimated the production of their members in order to obtain a larger cash advance for crop purchases and then were forced to make up the shortfall with substandard cherries. Government extension agents will now work more closely with the farmers to insure proper bean collection and conditioning.

About 92 percent of Indonesia's coffee area is cultivated by small holders. Among the estate sector which constitutes the remaining area, 44 percent are state-owned and the balance private. Existing estates are mostly located in East Java, but some are in Central and South Sulawesi. Since the government's main concern is now quality rather the quantity, the planting of coffee is discouraged in areas where other crops could be grown. The average yield of coffee in Indonesia is about 500 kg/ha. Through increased tree density, improved cultural and harvesting practices, and the modernization of processing methods among small holders, the government hopes to move the average toward the target level of 800 kg/Ha.

For 1984/85, Indonesia's coffee exports are expected to decline slightly because the Indonesian Association of Coffee Exporters (AEK) has proposed that Indonesia decrease its coffee exports to non-ICO countries in part to support coffee prices and in part to insure an adequate domestic supply.

The United States remains Indonesia's largest coffee buyer. For the period January-July 1984, 39 percent of all exports were shipped to the United States. As of September 1, 1984, export surcharges of 1.67 percent and 3.85 percent, respectively were placed on Arabica and Robusta bean exports.

Based on post blossom estimates, the 1984/85 (October/September) Indian coffee crop could reach a record 2.83 million bags, including 1.40 million bags of Arabica and 1.43 million bags of Robusta. The cyclical biennial bearing tendency of the coffee tree is also responsible for the anticipated record, up 1.16 million bags over the drought affected crop harvested in 1983/84.

The Coffee Board, in its 7th Five Year Plan, has targeted a growth rate of 5.5 percent per year with output at 3.0 million bags by the terminal year--1989/90. In order to reach the goal, area will be expanded by 50,000 hectares, including 20,000 hectares in traditional coffee areas and 30,000 hectares in non-traditional areas. There are an estimated 242,000 hectares in coffee this year, up from 234,000 in 1983/84.

India's short crop in 1983/84 marginally reduced exports, including soluble coffee, to 1.12 million bags versus 1.14 million bags the previous year. Due to the expectation of a record crop for 1984/85, exports for the year are forecast at 1.5 million bags. About half of the sales will be made to countries outside the ICO under bilateral agreements, principally the Soviet Union. In large measure India controls its ability to export to non-members by price and the level of its export duty. There are no export duties on the small quantity of instant coffee exported.

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TABLE 1

Coffee, Green: Total Production in Specified Countries - Average 1975/76-1979/80, Annual 1980/81-1984/85 1/
(In thousands of 60 kilo bags. 2/)

REGION AND COUNTRY	AVERAGE 1975/76-1979/80	1980/81	1981/82	1982/83	1983/84	1984/85
NORTH AMERICA						
COSTA RICA.....	1,6465	2,140	1,732	2,300	2,070	2,350
CUBA.....	319	346	393	350	360	375
DOMINICAN REPUBLIC.....	906	1,112	950	1,100	800	900
EL SALVADOR.....	2,837	2,940	2,386	3,100	2,517	3,000
GUATEMALA.....	2,656	2,702	2,653	2,530	2,360	2,600
HAITI.....	538	605	694	674	560	625
HONDURAS.....	969	1,265	1,200	1,800	1,590	1,600
JAMAICA.....	24	20	23	30	33	40
MEXICO.....	3,698	3,882	3,900	4,530	4,370	4,480
NICARAGUA.....	926	933	950	1,257	710	1,000
PANAMA.....	92	142	120	151	143	150
TRINIDAD-TOBAGO.....	66	66	66	23	30	30
UNITED STATES.....	188	243	211	267	195	229
TOTAL NORTH AMERICA.....	14,460	16,214	15,696	18,112	15,778	17,379
SOUTH AMERICA						
BOLIVIA.....	120	145	135	155	150	160
BRAZIL.....	1,4360	21,500	33,000	17,750	30,000	27,000
COLONIA.....	10,832	13,500	14,342	13,300	13,000	12,800
ECUADOR.....	1,663	1,517	1,792	1,800	1,380	1,550
GUYANA.....	18	26	26	25	25	25
PARAGUAY.....	81	130	229	271	280	300
PERU.....	1,055	1,170	1,100	1,100	1,270	1,150
VENEZUELA.....	936	1,109	1,107	791	1,150	1,073
TOTAL SOUTH AMERICA.....	32,366	39,097	31,731	35,192	47,253	44,058
AFRICA						
ANGOLA.....	791	590	392	330	260	300
SENEGAL.....	9	36	37	50	55	50
BURUNDI.....	395	319	730	340	593	392
CAMEROON.....	1,690	1,959	1,093	1,929	1,058	2,117
CENTRAL AFRICAN REPUBLIC.....	168	277	284	316	150	250
CONGO, BRAZZAVILLE.....	51	40	36	32	35	40
EQUATORIAL GUINEA.....	13	15	20	25	30	35
ETHIOPIA.....	2,973	3,266	3,212	3,670	3,700	3,000
GABON.....	5	8	15	29	35	60
GHANA.....	45	27	35	23	25	25
GUINEA.....	67	112	66	65	60	70
IVORY COAST.....	6,396	6,090	6,160	6,510	1,617	6,833
KENYA.....	1,626	1,701	1,689	1,541	2,093	1,050
LIBERIA.....	139	167	165	159	135	155
MADAGASCAR.....	1,123	1,150	1,303	1,000	1,300	1,200
MALAWI.....	3	7	10	16	27	35
NIGERIA.....	53	52	52	45	62	40
RWANDA.....	628	506	502	377	536	500
SIERRA LEONE.....	142	147	176	233	190	185
TANZANIA.....	863	1,060	959	1,033	950	900
TOGO.....	139	165	225	284	275	280
UGANDA.....	2,180	2,133	2,085	3,200	3,600	3,500
ZAIRE (CONGO, D.R.).....	1,245	1,526	1,423	1,354	1,680	1,350
ZIMBABWE.....	74	94	82	117	147	180
TOTAL AFRICA.....	18,147	21,417	20,213	20,678	17,983	21,327
ASIA						
INDIA.....	1,926	1,977	2,540	2,170	1,670	2,830
INDONESIA.....	6,017	5,355	5,785	6,750	5,150	5,300
MALAYSIA.....	134	130	148	159	163	180
PHILIPPINES.....	618	966	1,067	1,000	990	1,089
THAILAND.....	120	201	277	327	300	325
Vietnam.....	63	70	60	60	60	60
YEMEN, ARAB REP.....	42	57	55	50	50	50
TOTAL ASIA.....	6,926	6,793	9,932	8,516	8,383	9,834
OCEANIA						
NEW CALEDONIA.....	9	10	10	10	10	10
PAPUA NEW GUINEA.....	723	953	480	891	950	1,000
TOTAL OCEANIA.....	734	363	690	901	960	1,010
WORLD TOTAL.....	73,134	86,364	98,062	83,399	90,359	93,608

1/ Coffee marketing year begins about October in some countries and April or July in others. 2/ 132.276 pounds.

NOTE: Production estimates for some countries include cross-border movements.

SOURCE: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information.

TABLE 2

COFFEE, GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1975/76-1979/80, ANNUAL 1980/81-1984/85
(IN THOUSANDS OF 60 KILO BAGS, 2/)

REGION AND COUNTRY	AVERAGE 1975/76-1979/80	1980/81	1981/82	1982/83	1983/84	1984/85
NORTH AMERICA:						
COSTA RICA.....	1,272	1,932	1,539	2,077	1,837	2,115
CUBA.....	—	—	—	—	—	—
DOMINICAN REPUBLIC.....	433	822	595	300	498	595
EL SALVADOR.....	2,667	2,760	2,686	2,900	2,317	2,300
GUATEMALA.....	2,151	2,381	2,328	2,193	2,000	2,260
HAITI.....	329	260	264	636	615	375
HONDURAS.....	362	1,149	1,090	1,676	1,622	1,668
JAMAICA.....	13	9	11	18	21	27
MEXICO.....	2,309	2,562	2,650	2,830	2,670	2,780
NICARAGUA.....	866	969	855	1,157	910	900
PANAMA.....	26	77	54	85	76	82
TRINIDAD-TOBAGO.....	30	26	26	3	10	9
UNITED STATES.....	—	—	—	—	—	—
TOTAL NORTH AMERICA.....	11,109	12,584	11,948	14,173	11,876	13,611
SOUTH AMERICA:						
BOLIVIA.....	39	111	100	119	115	123
BRAZIL.....	10,360	13,500	24,500	9,750	21,500	18,500
COLOMBIA.....	9,286	11,675	12,492	11,465	11,140	10,935
ECUADOR.....	1,273	1,297	1,562	1,560	1,135	1,290
GUYANA.....	—	3	3	3	3	3
PARAGUAY.....	60	108	207	248	237	277
PERU.....	305	929	862	860	1,045	960
VENEZUELA.....	164	19	31	—	225	73
TOTAL SOUTH AMERICA.....	22,238	27,662	30,787	23,963	35,420	32,141
AFRICA:						
ANGOLA.....	732	545	350	287	216	255
BENIN.....	9	35	36	69	56	49
BURUNDI.....	354	314	729	337	592	391
CAMEROON.....	1,462	1,925	1,913	1,904	1,032	2,092
CENTRAL AFRICAN REPUBLIC.....	159	260	266	298	137	235
CONGO, DRC (ZAIRE).....	50	39	35	31	36	39
ERUATORIAL GUINEA.....	3	—	—	5	13	20
ETHIOPIA.....	1,272	1,664	1,395	2,040	2,050	1,935
GAZON.....	4	7	14	28	36	39
GHANA.....	36	23	31	18	20	20
GUINEA.....	61	105	58	59	56	64
IVORY COAST.....	4,312	6,029	6,025	6,445	1,352	6,763
KENYA.....	1,377	1,663	1,434	1,501	2,069	1,000
LIBERIA.....	133	161	159	153	129	148
MADAGASCAR.....	942	984	1,132	823	1,120	1,017
MALAWI.....	3	7	10	16	27	35
NETHERLANDS	—	—	—	—	—	—
NETHERLANDS	—	—	—	—	—	—
UGANDA.....	426	504	500	376	535	499
SIERRA LEONE.....	137	142	171	228	176	179
TANZANIA.....	822	1,041	939	1,013	930	880
TOGO.....	138	166	224	283	274	279
UGANDA.....	2,143	2,090	2,860	3,156	3,353	3,452
ZAIRE (Congo-K.).....	1,080	1,366	1,240	1,169	1,295	1,350
ZIMBABWE.....	55	83	72	107	139	171
TOTAL AFRICA.....	15,784	19,097	17,869	18,324	15,615	18,912
ASIA:						
INDIA.....	1,093	1,090	1,599	1,167	698	1,830
INDONESIA.....	2,981	4,137	4,630	3,636	4,010	4,100
MALAYSIA.....	12	—	—	—	—	—
PHILIPPINES.....	271	512	372	400	318	410
THAILAND.....	21	83	131	191	139	180
VIETNAM.....	32	35	25	25	25	25
YEMEN, ARAB REP.....	38	47	65	40	40	40
TOTAL ASIA.....	6,449	5,904	7,022	5,459	5,250	6,585
OCEANIA:						
NEW CALEDONIA.....	—	—	—	—	—	—
PAPUA NEW GUINEA.....	712	837	664	876	933	983
TOTAL OCEANIA.....	712	837	664	876	933	983
WORLD TOTAL.....	56,279	66,064	77,170	62,797	69,094	72,032

1/ Coffee marketing year begins about October in some countries and April or July in others. Exportable production represents total harvested production minus estimated domestic consumption. 2/ 132,276 pounds.

NOTE: Production estimates for some countries include cross-border movements.

SOURCE: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source material, reports of U.S. Agricultural Attachés and Foreign Service Officers, results of office research, and related information.

TABLE 3

WORLD COFFEE SUPPLY AND DISTRIBUTION, 1961-1935

COUNTRY	3Y TIME PERIOD	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	DOMESTIC USE	EXPORTS		ENDING STOCKS	TOTAL
							DISTRIBUTION	BEANS		
WORLD TOTAL										
1951/52..	65,124	279	141,371	21,379	45,972	56	135	46,163	74,129	
1952/53..	74,129	256	142,176	14,690	46,752	42	123	45,947	80,539	
1953/54..	80,539	153	145,350	17,514	50,826	69	118	51,074	77,372	
1954/55..	77,372	52,634	177	130,203	16,741	41,769	58	78	41,905	71,557
1955/56..	71,557	32,157	249	153,963	17,809	49,670	37	257	49,964	86,190
1956/57..	85,190	53,386	279	149,355	19,252	48,328	26	564	48,918	81,686
1957/58..	91,684	71,144	273	153,103	19,067	54,724	55	741	55,521	79,516
1958/59..	79,516	63,238	228	143,032	19,636	52,548	76	963	53,587	69,810
1959/60..	69,525	69,810	267	139,703	18,887	53,865	83	1,161	55,109	65,707
1960/61..	65,707	59,426	505	125,638	19,368	50,555	112	1,253	51,920	54,351
1961/62..	73,316	524	128,191	19,053	56,651	249	1,559	58,439	50,648	
1962/63..	50,648	77,198	497	128,343	17,449	59,016	346	2,040	61,402	49,492
1963/64..	49,492	65,732	553	115,787	19,011	58,301	192	2,149	60,642	36,133
1964/65..	36,133	82,735	464	119,392	19,164	53,260	235	1,985	55,480	44,738
1965/66..	44,738	73,109	410	118,257	19,177	57,151	371	2,164	59,687	39,394
1966/67..	39,374	60,907	529	100,830	18,396	54,191	351	2,176	56,718	25,716
1967/68..	25,716	70,350	593	97,159	18,773	47,761	185	893	48,839	29,547
1968/69..	29,547	72,941	713	109,201	19,479	61,918	225	2,430	64,573	25,149
1969/70..	25,149	81,851	687	107,697	19,978	58,950	219	2,572	61,741	25,978
1970/71..	25,978	86,344	617	112,939	20,583	56,902	155	2,821	59,878	32,478
1971/72..	32,478	98,062	702	131,242	21,222	60,416	224	4,056	64,696	45,324
1972/73..	19,822	83,399	719	129,442	20,916	62,231	187	2,488	64,906	43,620
1973/74..	45,324	90,359	696	134,675	21,592	64,709	267	2,837	67,813	45,270
1974/75..	43,620	92,608	667	139,545	21,842	66,022	271	2,947	69,240	48,463
1975/76..	45,270	93,608	---	---	---	---	---	---	---	---
1976/77..	39,374	60,907	---	---	---	---	---	---	---	---
1977/78..	25,716	70,350	---	---	---	---	---	---	---	---
1978/79..	29,547	72,941	---	---	---	---	---	---	---	---
1979/80..	25,978	81,851	---	---	---	---	---	---	---	---
1980/81..	25,978	86,344	---	---	---	---	---	---	---	---
1981/82..	32,478	98,062	---	---	---	---	---	---	---	---
1982/83..	45,324	83,399	---	---	---	---	---	---	---	---
1983/84..	43,620	90,359	---	---	---	---	---	---	---	---
1984/85..	45,270	93,608	---	---	---	---	---	---	---	---

NOTE: TOTAL MAY NOT ADD BECAUSE OF ROUNDING, -- DENOTES UNAVAILABLE, NEGLIGIBLE, OR ZERO

DECEMBER 1934

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION
COMMODITY PROGRAMS, FAS, USDA

TABLE 4

WORLD COFFEE SUPPLY AND DISTRIBUTION, 1984/85 1/
(In Thousands of 60 Kg Bags)

Country	Beginning Stocks	Production	Imports	Total S/O	Exports	Domestic Use	Ending Stocks
Costa Rica.....	901	2,350	---	3,251	1,762	235	1,254
Cuba.....	---	375	275	650	250	400	---
Dominican Rep.....	660	900	---	1,560	600	305	655
El Salvador.....	1,475	3,000	---	4,475	2,770	200	1,505
Guatemala.....	910	2,600	---	3,510	2,300	340	870
Haiti.....	40	625	---	665	400	250	15
Honduras.....	1,181	1,600	---	2,781	1,200	132	1,449
Jamaica.....	10	40	2	52	30	13	9
Mexico.....	1,015	4,480	---	5,495	3,100	1,700	695
Nicaragua.....	40	1,000	---	1,040	850	100	90
Panama.....	35	150	---	185	65	68	52
Trin-Tob.....	7	30	4	41	13	21	7
United States.....	101	229	90	420	---	300	120
 Total.....	 6,375	 17,379	 371	 24,125	 13,340	 4,064	 6,721
 Bolivia.....	 27	 160	 ---	 187	 120	 37	 30
Brazil.....	8,714	27,000	---	35,714	18,000	8,500	9,714
Colombia.....	12,686	12,800	---	25,486	10,000	1,865	13,621
Ecuador.....	765	1,550	---	2,315	1,480	260	575
Guyana.....	---	25	---	25	3	??	---
Paraguay.....	187	300	---	487	200	23	264
Peru.....	530	1,150	---	1,680	950	210	520
Venezuela.....	301	1,073	---	1,374	110	1,000	264
 Total.....	 23,210	 44,058	 ---	 67,268	 30,863	 11,917	 24,488
 Angola.....	 843	 300	 ---	 1,143	 400	 45	 698
Benin.....	---	50	---	50	49	1	---
Burundi.....	220	392	---	612	470	1	141
Cameroon.....	908	2,117	1	3,026	1,750	25	1,251
Cent. Af. Rep.....	5	250	---	255	234	15	6
Congo.....	5	40	---	45	37	1	7
Equat. Guinea.....	---	35	---	35	20	15	---
Ethiopia.....	2,334	3,600	---	5,934	1,650	1,665	2,619
Gabon.....	---	40	---	40	39	1	---
Ghana.....	40	25	---	65	25	5	35
Guinea.....	45	70	---	115	68	6	41
Ivory Coast.....	429	4,833	---	5,262	4,484	70	708
Kenya.....	1,402	1,050	---	2,452	1,533	50	869
Liberia.....	40	155	5	200	150	7	43
Madagascar.....	879	1,200	---	2,079	970	183	926
Malawi.....	7	35	---	42	26	---	16
Nigeria.....	25	40	127	192	35	135	22
Rwanda.....	70	500	---	570	500	1	69
Sierra Leone.....	1	185	---	186	175	6	5
Tanzania.....	517	900	---	1,417	950	20	447
Togo.....	25	280	---	305	275	1	29
Uganda.....	3,806	3,500	---	7,306	2,700	48	4,558
Zaire.....	1,070	1,550	---	2,620	1,150	200	1,270
Zimbabwe.....	43	180	---	223	136	9	78
 Total.....	 12,714	 21,327	 133	 34,174	 17,826	 2,510	 13,838
 India.....	 526	 2,830	 ---	 3,356	 1,500	 1,000	 856
Indonesia.....	1,587	5,300	---	6,887	4,000	1,200	1,687
Malaysia.....	40	180	160	380	80	255	45
Philippines.....	530	1,089	---	1,619	410	679	530
Thailand.....	101	325	3	429	160	145	124
Vietnam.....	---	60	---	60	25	35	---
Yemen Arab Rep.....	---	50	---	50	40	10	---
 Total.....	 2,784	 9,834	 163	 12,781	 6,215	 3,324	 3,242
 New Caledonia.....	 ---	 10	 ---	 10	 ---	 10	 ---
Papua-N Guinea.....	187	1,000	---	1,187	996	17	174
 Total.....	 187	 1,010	 ---	 1,197	 996	 27	 174
 WORLD TOTAL.....	 45,270	 93,608	 667	 139,545	 69,240	 21,842	 48,463

1/ Forecast. Coffee marketing year begins about October in some countries and April or July in others.

TABLE 5

U.S. IMPORTS OF COFFEE BY TYPES AND COFFEE YEARS (OCTOBER/SEPTEMBER) 1982/83 AND 1983/84
(In 60 Kilogram Bags, Green Bean Equivalent)

	1982/83				1983/84			
	Green	Roasted/ Ground	Soluble 1/	Total	Green	Roasted/ Ground	Soluble 2/	Total
COLOMBIAN MILDS								
Colombia.....	1,797,797	17,320	56,736	1,871,853	2,117,181	80	63,269	2,180,530
Kenya.....	313,485	11	—	313,496	193,068	5	—	193,073
Tanzania.....	15,443	6	—	15,449	9,717	433	—	10,150
Total.....	2,126,725	17,337	56,736	2,200,798	2,319,966	85	63,702	2,383,753
OTHER MILDS								
Burundi.....	93,386	—	—	93,386	11,446	—	—	11,446
Costa Rica.....	213,676	30,165	—	243,841	296,519	10,218	—	306,737
Dominican Republic..	431,855	305	—	432,160	468,545	947	1,025	470,517
Ecuador.....	811,348	396	113,433	925,177	1,002,356	165	94,275	1,096,796
El Salvador.....	1,156,085	819	21,434	1,188,338	1,185,720	90	18,364	1,204,174
Guatemala.....	809,272	2,341	1,294	812,907	1,069,818	884	478	1,071,180
Haiti.....	154,948	—	—	154,948	118,464	—	—	118,464
Honduras.....	194,257	—	—	194,257	328,945	81	—	329,026
India.....	195,325	—	—	195,325	170,467	2,168	—	172,635
Jamaica.....	996	669	32	1,697	808	377	14	1,199
Mexico.....	1,414,860	124,528	10,088	1,549,476	1,693,243	179,392	3,445	1,876,080
Nicaragua.....	5,873	7	13,206	19,086	2,563	—	8	2,571
Panama.....	46,356	—	—	46,356	53,971	—	—	53,971
Papua New Guinea....	43,378	—	—	43,378	63,112	—	—	63,112
Peru.....	454,754	1,036	3,812	459,602	544,419	—	264	544,683
Rwanda.....	207,307	—	—	207,307	94,363	—	1,949	96,312
Venezuela.....	11,406	—	—	11,406	86,078	3,277	—	89,355
Yemen Arab Republic..	471	—	—	471	—	—	—	—
Zimbabwe.....	27,211	—	—	27,211	24,000	—	—	24,000
Total.....	6,282,764	160,266	163,299	6,606,329	7,214,837	197,599	119,822	7,532,258
UNWASHED ARABICS								
Bolivia.....	18,193	—	—	18,193	3,975	—	—	3,975
Brazil.....	3,593,344	25,161	869,848	4,488,353	3,623,504	58,530	840,273	4,522,307
Ethiopia.....	552,113	—	—	552,113	418,082	—	260	418,342
Paraguay.....	108,688	—	—	108,688	152,802	—	—	152,802
Total.....	4,272,338	25,161	869,848	5,167,347	4,198,363	58,530	840,533	5,097,426
ROBUSTAS								
Angola.....	73,562	—	—	73,562	4,992	—	—	4,992
Cameroun.....	179,015	—	—	179,015	66,165	15	—	66,180
Central Afr. Rep....	7,560	—	—	7,560	—	—	—	—
Guinea.....	23,204	—	—	23,204	28,811	—	—	28,811
Indonesia.....	1,096,435	5,010	—	1,101,445	1,147,633	1,837	—	1,149,470
Ivory Coast.....	613,043	—	54	613,097	1,205,509	—	—	1,205,509
Liberia.....	35,529	—	—	35,529	22,775	—	—	22,775
Madagascar.....	155,350	5	—	155,355	82,802	—	—	82,802
Malaysia.....	30,255	—	—	30,255	6,622	—	—	6,622
Nigeria.....	—	—	—	—	4,603	—	—	4,603
Philippines.....	335,132	1,222	—	336,354	241,722	1,309	—	243,031
Sierra Leone.....	96,687	—	—	96,687	190,553	—	—	190,553
Sri Lanka.....	22,266	—	—	22,266	17,634	—	—	17,634
Thailand.....	103,359	2	14	103,373	94,036	6	—	94,042
Togo.....	141,536	—	—	141,536	188,340	—	—	188,340
Trinidad & Tobago....	10,904	—	—	10,904	4,035	—	—	4,035
Uganda.....	1,055,016	—	—	1,055,016	643,522	—	—	643,522
Zaire.....	38,224	5	—	38,229	9,559	29	—	9,588
Total.....	4,017,077	6,244	68	4,023,389	3,959,313	3,196	—	3,962,509
OTHER COUNTRIES 3/.....	394,582	13,343	66,009	473,934	430,694	16,667	66,814	514,175
WORLD TOTAL.....	17,093,486	222,351	1,155,960	18,471,797	18,123,173	276,077	1,090,871	19,490,121

1/ Conversion rate 1 lb. soluble=3 lbs. green. 2/ Conversion rate 1 lb. soluble=2.6 lbs. green. 3/ Mainly non-producing countries in Western Europe.

SOURCE: USDA

January 1985

Horticultural and Tropical Products Division, FAS/USDA

TABLE 6

SHARE IN INITIAL ANNUAL QUOTA OF EXPORTING MEMBERS
ENTITLED TO A BASIC QUOTA AND EXEMPT FROM BASIC QUOTAS

COFFEE YEARS 1984/85 AND 1985/86

Exporting Member entitled to a basic quota	Share of annual quota	Exporting Member exempt from basic quotas	Share of annual quota
	(1)		(2)
TOTAL (with Angola)		TOTAL	100.00
TOTAL (without Angola)	100.00	Members other than OAMCAF	70.96
<u>Colombian Milds</u>	<u>19.94</u>	Sub-total: Members exporting <u>100 000 bags or less (without OAMCAF)</u>	<u>21.13</u>
Colombia	16.13	Equatorial Guinea	0.84
Kenya	2.46	Ghana	2.11
Tanzania	1.35	Jamaica	1.05
<u>Other Milds</u>	<u>23.16</u>	Malawi	0.98
Costa Rica	2.14	Nigeria	3.07
Dominican Republic	0.94	Panama	2.76
Ecuador	2.15	Sri Lanka	2.26
El Salvador	4.44	Trinidad and Tobago	1.43
Guatemala	3.44	Venezuela	3.36
Honduras	1.48	Zimbabwe	3.27
India	1.23	Sub-total: Members exporting <u>more than 100 000 bags (without OAMCAF)</u>	<u>49.83</u>
Mexico	3.62	Bolivia	4.60
Nicaragua	1.27	Guinea	4.20
Papua New Guinea	1.15	Haiti	16.79
Peru	1.30	Liberia	5.46
<u>Brazilian and Other Arabicas</u>	<u>33.15</u>	Paraguay	4.56
Brazil	30.55	Sierra Leone	9.83
Ethiopia	2.60	Thailand	4.39
<u>Robustas</u>	<u>23.75</u>	<u>OAMCAF</u>	<u>29.04</u>
Indonesia	4.51	(a) Members exporting <u>100 000 bags or less</u>	<u>5.57</u>
OAMCAF	(11.85)		
Cameroon	2.71	Benin	2.21
Ivory Coast	7.68	Congo	1.68
Madagascar	1.46	Gabon	1.68
Philippines	0.89	(b) Members exporting <u>more than 100 000 bags</u>	<u>23.47</u>
Uganda	4.40	Central African Republic	11.19
Zaire	2.10	Togo	12.28
Angola		<u>Burundi and Rwanda</u>	
		Burundi	
		Rwanda	

TABLE 7

COFFEE YEAR 1984/85

EXPORTING MEMBERS ENTITLED TO A BASIC QUOTA
INITIAL ANNUAL QUOTA PLUS TWO INCREASES

(60 kilo bags)

Exporting Member	Share of annual quota as approved by Resolution No. 335 (percent)	Amount corresponding to share in col.(1)	Special allocations (Resolution No. 335)	Initial annual quota col.(2)+(3)	Two increases in quota of 1 m. bags		Initial annual quota plus increases col.(4)+(5)
					(4)	(5)	
(1)	(2)	(3)	(4)	(5)	(6)		
TOTAL (with Angola)		55 187 500	305 000	55 492 500	2 000 000		57 492 500
TOTAL (without Angola)	100.00	54 807 500	305 000	55 112 500	2 000 000	1/	57 112 500
Colombian Milds	19.94	10 928 615		10 928 615	398 800		11 327 415
Colombia	16.13	8 840 450		8 840 450	322 600		9 163 050
Kenya	2.46	1 348 264		1 348 264	49 200		1 397 464
Tanzania	1.35	739 901		739 901	27 000		766 901
Other Milds	23.16	12 693 417	130 000	12 823 417	463 200		13 286 617
Costa Rica	2.14	1 172 881	45 000	1 217 881	42 800		1 260 681
Dominican Republic	0.94	515 190		515 190	18 800		533 990
Ecuador	2.15	1 178 361		1 178 361	43 000		1 221 361
El Salvador	4.44	2 433 453		2 433 453	88 800		2 522 253
Guatemala	3.44	1 885 378		1 885 378	68 800		1 954 178
Honduras	1.48	811 151	45 000	856 151	29 600		885 751
India	1.23	674 132	25 000	699 132	24 600		723 732
Mexico	3.62	1 984 032		1 984 032	72 400		2 056 432
Nicaragua	1.27	696 055		696 055	25 400		721 455
Papua New Guinea	1.15	630 286	15 000	645 286	23 000		668 286
Peru	1.30	712 498		712 498	26 000		738 498
Brazilian and Other Arabicas	33.15	18 168 686	25 000	18 193 686	663 000		18 856 686
Brazil	30.55	16 743 691		16 743 691	611 000		17 354 691
Ethiopia	2.60	1 424 995	25 000	1 449 995	52 000		1 501 995
Robustas 1/	23.75	13 016 782	150 000	13 166 782	475 000		13 641 782
Indonesia	4.51	2 471 818	25 000	2 496 818	90 200		2 587 018
OAMCAF	(11.85)	(6 494 689)		(6 494 689)	(237 000)		(6 731 689)
Cameroon	2.71	1 485 283		1 485 283	54 200		1 539 483
Ivory Coast	7.68	4 209 216		4 209 216	153 600		4 362 816
Madagascar	1.46	800 190		800 190	29 200		829 390
Philippines	0.89	487 787		487 787	17 800		505 587
Uganda	4.40	2 411 530	100 000	2 511 530	88 000		2 599 530
Zaire	2.10	1 150 958	25 000	1 175 958	42 000		1 217 958
Angola		380 000		380 000			380 000

1/ Excludes Angola which is not subject to increases and reductions

TABLE 8

COFFEE YEAR 1984/85
INITIAL ANNUAL QUOTA PLUS ONE INCREASE AND QUARTERLY QUOTAS
 - in bags of 60 kilos -

<u>Exporting Member</u>	Initial annual quota plus one increase of one million bags	Quarterly Quotas			
		Oct. /Dec. 1984 1/	Jan. -Mar. 1985	Apr. -June 1985	July -Sept. 1985
<u>TOTAL</u>	<u>60,000,000</u>	<u>16,152,248</u>	<u>14,223,856</u>	<u>14,864,295</u>	<u>14,864,303</u>
<u>Sub-total: Members entitled to a basic quota</u>	<u>57,220,678</u>	<u>15,352,717</u>	<u>13,529,023</u>	<u>14,169,466</u>	<u>14,169,472</u>
<u>Colombian Milds</u>	<u>11,128,015</u>	<u>2,931,553</u>	<u>2,732,154</u>	<u>2,732,153</u>	<u>2,732,155</u>
Colombia	9,001,750	2,371,412	2,210,113	2,210,112	2,210,113
Kenya	1,372,864	361,666	337,066	337,066	337,066
Tanzania	753,401	198,475	184,975	184,975	184,976
<u>Other Milds</u>	<u>13,055,017</u>	<u>3,437,452</u>	<u>3,205,856</u>	<u>3,205,852</u>	<u>3,205,857</u>
Costa Rica	1,239,281	325,870	304,470	304,470	304,471
Dominican Rep.	524,590	138,197	128,798	128,797	128,798
Ecuador	1,199,861	316,090	294,590	294,590	294,591
El Salvador	2,477,853	652,763	608,363	608,363	608,364
Guatemala	1,919,778	505,744	471,345	471,344	471,345
Honduras	870,951	228,838	214,038	214,038	214,037
India	711,432	187,083	174,783	174,783	174,783
Mexico	2,020,232	532,208	496,008	496,008	496,008
Nicaragua	708,755	186,714	174,014	174,014	174,013
Papua New Guinea	656,786	172,821	161,322	161,321	161,322
Peru	725,498	191,124	178,125	178,124	178,125
<u>Brazil & oth. Arabicas</u>	<u>18,525,186</u>	<u>4,879,922</u>	<u>4,548,422</u>	<u>4,548,422</u>	<u>4,548,420</u>
Brazil	17,049,191	4,491,423	4,185,923	4,185,923	4,185,922
Ethiopia	1,475,995	388,499	362,499	362,499	362,498
<u>Robustas</u>	<u>14,512,460</u>	<u>4,103,790</u>	<u>3,042,591</u>	<u>3,683,039</u>	<u>3,683,040</u>
Angola	380,000	95,000	95,000	95,000	95,000
Indonesia	2,541,918	860,356	388,053	646,754	646,755
OAMCAF	7,341,367	1,746,467	1,864,967	1,864,967	1,864,966
Philippines	496,687	130,847	121,947	121,947	121,946
Uganda	2,555,530	865,835	389,930	649,882	649,883
Zaire	1,196,958	405,285	182,694	304,489	304,490
<u>Sub-total: Members exempt from basic quotas</u>	<u>2,779,322</u>	<u>799,531</u>	<u>694,833</u>	<u>694,829</u>	<u>694,831</u>

Note: 1/ Includes one increase of 1.0 million bags.

TABLE 9

COFFEE YEAR 1984/85

EXPORTING MEMBERS EXEMPT FROM BASIC QUOTAS
INITIAL ANNUAL QUOTA

(60 kilo bags)

Exporting Member	Share of annual quota 1/ (percent)	Amount of annual quota	Special allocations (Resolution No. 335)	Initial annual quota col(2)+(3)	
			(1)	(2)	(3)
<u>INITIAL ANNUAL QUOTA</u>					
TOTAL - including Burundi and Rwanda		<u>3 447 500</u>	<u>60 000</u>	<u>3 507 500</u>	
TOTAL - excluding Burundi and Rwanda 4.25 percent of global annual quota of 59 million bags	<u>100.00</u>	<u>2 507 500</u>	<u>60 000</u>	<u>2 567 500</u>	
<u>Members other than OAMCAF</u>	<u>70.96</u>	<u>1 779 322</u>	<u>60 000</u>	<u>1 839 322</u>	
<u>Sub-total: Members exporting 100 000 bags or less (without OAMCAF)</u>	<u>21.13</u>	<u>529 835</u>	<u>40 000</u>	<u>569 835</u>	
Equatorial Guinea (R)	0.84	21 063		21 063	
Ghana (R)	2.11	52 908		52 908	
Jamaica (A)	1.05	26 329		26 329	
Malawi (A)	0.98	24 574		24 574	
Nigeria (R)	3.07	76 980		76 980	
Panama (A)	2.76	69 207	10 000	79 207	
Sri Lanka (R)	2.26	56 670	10 000	66 670	
Trinidad and Tobago (R)	1.43	35 857		35 857	
Venezuela (A)	3.36	84 252	10 000	94 252	
Zimbabwe (A)	3.27	81 995	10 000	91 995	
<u>Sub-total: Members exporting more than 100 000 bags (without OAMCAF)</u>	<u>49.83</u>	<u>1 249 487</u>	<u>20 000</u>	<u>1 269 487</u>	
Bolivia (A)	4.60	115 345		115 345	
Guinea (R)	4.20	105 315		105 315	
Haiti (A)	16.79	421 009		421 009	
Liberia (R)	5.46	136 910		136 910	
Paraguay (A)	4.56	114 342	10 000	124 342	
Sierra Leone (R)	9.83	246 487		246 487	
Thailand (R)	4.39	110 079	10 000	120 079	
<u>OAMCAF</u> (R)	<u>29.04</u>	<u>728 178</u>		<u>728 178</u>	
(a) <u>Members exporting 100 000 bags or less</u>	<u>5.57</u>	<u>139 668</u>		<u>139 668</u>	
Benin	2.21	55 416		55 416	
Congo	1.68	42 126		42 126	
Gabon	1.68	42 126		42 126	
(b) <u>Members exporting more than 100 000 bags</u>	<u>23.47</u>	<u>588 510</u>		<u>588 510</u>	
Central African Republic	11.19	280 589		280 589	
Togo	12.28	307 921		307 921	
<u>Burundi and Rwanda</u> (A)		<u>940 000</u>		<u>940 000</u>	
Burundi		470 000 <u>2/</u>		470 000	
Rwanda		470 000 <u>2/</u>		470 000	

1/ Percentages in Annex 2 of the Agreement adjusted for Equatorial Guinea and Jamaica.
See Resolution number 335 and Annex Table 1

2/ See sub-paragraph (a) of paragraph (6) of Article 31 of the Agreement

TABLE 10

LIMITATION ON IMPORTS BY IMPORTING MEMBERS FROM NON-MEMBERS
COFFEE YEAR 1984/85

Importing Member	Average Imports 1980/81-1982/83	Non-member Import Limitation 1983/84	Maximum Limits to be applied 1984/85	Adjusted Import Limitation 1984/85 4/
TOTAL	454,609	507,619	441,706	429,053
U.S.A.	74,710	109,150	74,710	74,710
E.E.C.	143,800	122,854	115,838	113,441
Belgium/Luxembourg	48,165	23,027	23,027 (L)	23,027
Denmark	18,182	18,566	18,182 (A)	18,182
France	9,996	11,405	9,996 (A)	9,996
Germany, F.R. of	7,009	5,990	5,990 (L)	4,884
Greece	1,587 1/	1,661*	1,611 (L)*	1,611
Ireland	648	747*	747 (L)*	747
Italy	39,505	44,728	39,505 (A)	39,505
Netherlands	14,997	12,908	12,908 (L)	11,617
United Kingdom	4,241	3,872	3,872 (L)	3,872
Other Members	236,099	275,615	251,158	240,902
Australia	1,652	1,652*	1,652 (L)*	1,652
Austria	4,504	4,654	4,504 (A)	4,504
Canada	1,473	1,805*	1,805 (L)*	1,805
Cyprus	0	148*	148 (L)*	148
Fiji	0 2/	4*	4 (L)*	4
Finland	3,236	2,770	2,770 (L)	2,770
Japan	23,024	24,933	23,024 (A)	22,440
New Zealand	444	576*	576 (L)*	576
Norway	7,269	7,717	7,269 (A)	7,269
Portugal	9,891	9,932	9,891 (A)	9,891
Singapore	96,732 1/	98,641	96,732	87,060
Spain	86,647	79,578 3/	79,578 (L)	79,578
Sweden	122	240	240 (L)*	240
Switzerland	18,064	16,060	16,060 (L)	16,060
Yugoslavia	15,283	6,905	6,905 (L)	6,905

*This latest decision does not automatically apply to importing members whose current annual non-member import limitation is less than 2,000 bags. 1/ 1981/82 and 1982/83 only. 2/ No data for 1980/81 to 1982/83. 3/ Adjusted for the accession of Equatorial Guinea. (A) Limitation determined by average imports 1980/81 to 1982/83. (L) Limitation determined by 1983/84 import limitation. 4/ After voluntary reductions.

SOURCE: International Coffee Organization

January 1985

Horticultural and Tropical Products Division, FAS/USDA

TABLE 11

1984 ICO COMPOSITE INDICATOR PRICE (1979 AGREEMENT)
(U.S. CENTS PER POUND EQUIVALENT)

Date	Daily			15-Day Moving Average		
	July	Aug.	Sept.	Oct.	Nov.	Dec.
1.....	138.50	---	134.97	136.77	---	1
2.....	143.96	138.70	---	135.17	137.30	2
3.....	143.54	139.32	146.87	135.66	133.31	3
4.....	---	---	146.48	136.12	135.02	4
5.....	144.02	138.85	146.53	135.82	137.95	5
6.....	143.76	138.57	146.19	138.65	134.98	6
7.....	---	139.29	---	139.26	134.41	7
8.....	143.04	141.23	---	135.47	139.52	---
9.....	143.04	142.24	145.21	135.81	133.16	9
10....	143.04	142.24	145.21	135.81	143.59	10
11....	141.38	---	143.57	135.31	133.75	11
12....	140.13	---	142.93	140.66	134.39	12
13....	140.39	142.06	143.04	141.17	133.68	13
14....	---	142.41	142.08	140.72	133.62	14
15....	141.48	---	135.91	140.71	---	15
16....	141.12	141.99	---	135.88	139.78	16
17....	141.55	142.66	141.12	136.78	---	17
18....	140.53	---	140.79	136.02	134.15	18
19....	140.11	---	141.00	136.71	132.99	19
20....	140.10	142.54	140.29	139.11	132.99	20
21....	---	143.27	139.55	137.59	133.45	21
22....	144.30	---	136.50	136.27	---	22
23....	140.79	145.15	---	136.50	136.78	23
24....	139.37	144.64	139.71	136.50	---	24
25....	140.40	---	138.60	136.51	---	25
26....	138.81	---	136.87	136.43	137.09	26
27....	138.90	150.58	137.28	---	136.18	27
28....	---	149.28	137.05	135.91	134.04	28
29....	---	148.46	---	136.25	134.29	29
30....	138.32	148.38	---	134.06	---	30
31....	137.98	148.18	---	136.77	134.01	31
Ave.	141.01	143.13	141.85	135.99	138.14	133.89

Note: Dashes denote weekends and holidays.

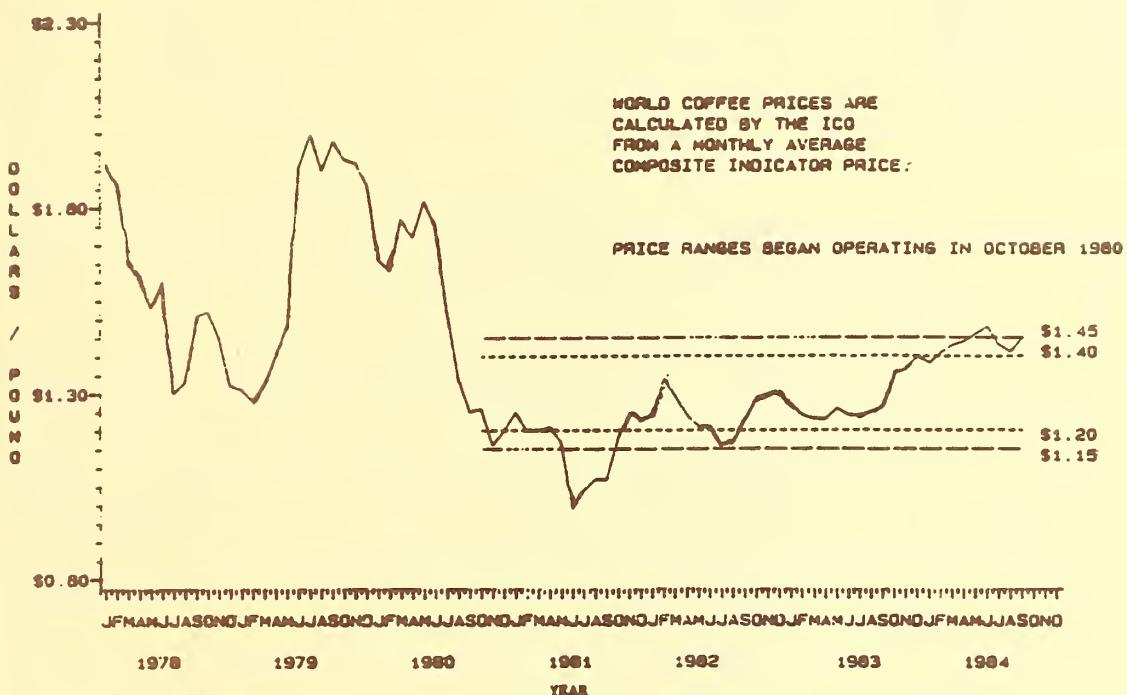
January 1985

Horticultural and Tropical Products Division, FAS/ISDA

FIGURE 1

FIGURE 1

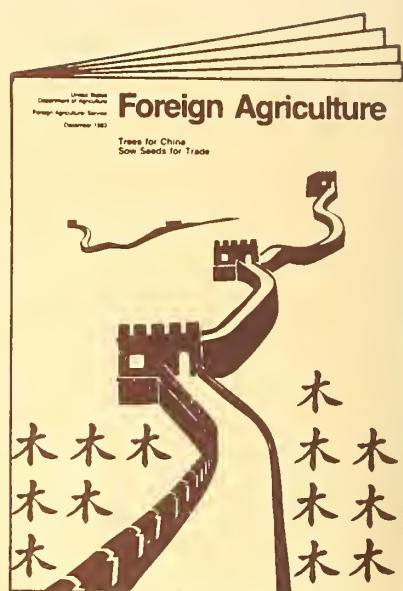
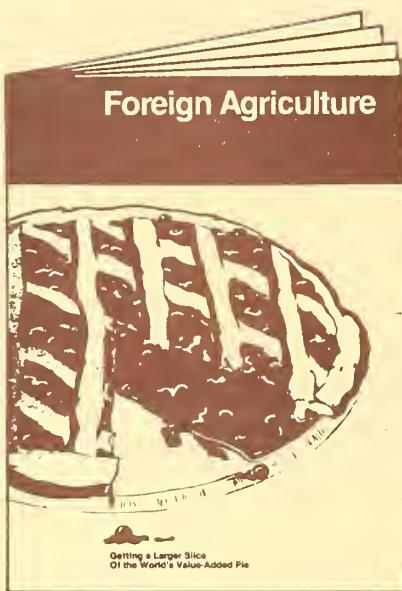
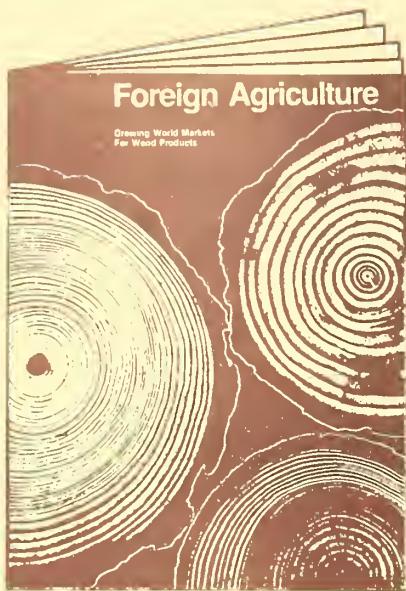
**INTERNATIONAL COFFEE AGREEMENT
COMPOSITE AVERAGE PRICES, FOR COFFEE
1978-1984: COMPARISON WITH
PRICE RANGES UNDER ICO. 1980-1984.**



* The indicator price is a composite of the ex-dock New York and Hamburg-Bremen prices of "Other Mild Arabica" and ex-dock New York and Marseilles-Le Havre prices of Robusta-type green coffee. The ex-dock price of a commodity includes the costs of making the goods available at dockside of the port named.

Source: Compiled from ICO data reported by the U.S. Department of Agriculture and the U.S. Department of Commerce.

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- New competitors and products?
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